

➤➤ *Appendix C*

Team Review Documents:

Progress Review Checksheet &
Example Team Review Report

QUALITY IMPROVEMENT TEAM PROGRESS REVIEW

Team: _____

Date: _____

Objectives / Desired Results:	✓	Review Comments:
<p>1. Situation To identify an opportunity for improvement from an analysis of customer and/or process data.</p> <ol style="list-style-type: none"> 1. Areas of importance and satisfaction to customers are clearly identified. 2. Reason for the project is clearly understood. <p>2. Project Team To recognize the quality improvement team members assigned to the project.</p> <p>3. Objective Statement To specify the intended result of the quality improvement effort.</p> <ol style="list-style-type: none"> 1. The quality indicator is obtained from the situation analysis. 2. The direction indicator and process are clearly specified. <p>4. Process Description To gain knowledge of the existing process and how it currently works.</p> <ol style="list-style-type: none"> 1. Process boundaries are clearly defined. 2. The overall sequence of steps is known. <p>5. QMP Values To determine the current behavior of the process with respect to the primary QMP.</p> <ol style="list-style-type: none"> 1. QMP's are clearly defined and include a unit of measurement. 2. QMP data is available in numerical and/or chart format. <p>6. Cause & Effect Analysis To identify the most probable causes for current process performance.</p> <ol style="list-style-type: none"> 1. The effect statement is consistent with the objective statement. 2. A cause and effect analysis identifies the most probable causes. <p>7. Theories for Change To develop and test appropriate theories for changes to the process.</p> <ol style="list-style-type: none"> 1. Theories are identified for each of the most probable causes. 2. Results of test data are used to select proposed solutions. <p>8. Corrective Actions To implement approved solutions to improve process performance.</p> <ol style="list-style-type: none"> 1. Proposed solutions are approved prior to implementation. 2. Steps are taken to normalize changes process . <p>9. Improvement Results To identify and document the results of corrective actions taken.</p> <ol style="list-style-type: none"> 1. QMP data clearly shows improvement from initial values. 2. Other benefits of the changes are well documented. <p>10. Future Plans To determine the status of the project and the quality improvement team.</p> <ol style="list-style-type: none"> 1. Remaining unresolved issues are understood and documented. 2. Future plans for the project have been documented. 	<div style="font-size: 2em; margin-top: 10px;">✓</div>	

Example

QUALITY TEAM REVIEW

August 17, 1994
Data Entry CQI Team

Review Comments:

Excellent presentation by the team during the review. The summary document used to guide the review was very valuable in keeping the review in focus. It was evident from the storybook document that the team has followed the PDCA process very well. It was obvious that a lot of work has been done on the project.

1. The situation analysis was based on a high percentage of errors on data entered into the PAID system from purchase orders. There was however, no customer or process data available.
2. The objective statements were both well written. The statement reflecting 'timelines' might need further definition to specifically define the problem being worked on.
3. The process flow diagrams were excellent. The identification of three separate input processes might need further analysis as regards to frequency of occurrence of problems, severity of impact, criticality, in order to prioritize team activities.
4. The QMP's were good, but wasn't clear what the purpose of the other measurements was. No initial values were available for review.
5. The cause and effect diagrams were extremely well done. They very clearly identified the most probable causes. The fact that the Team completed a separate diagram for both objective statements showed excellent knowledge in using the tools.
6. Theories for solution were well documented. Currently team is in the process of data collection for testing of theories.

Recomendations:

The complexity of the process as evidenced by the process flow diagrams, the number of objective statements, and the large number of people on the team should be reviewed. Suggest possibly looking at two teams of smaller size focused on each of the objective statements, with the current team becoming a second-level team. Another approach would be to prioritize the processes picking the highest to focus on. It would be beneficial to document customer driven data relative to the objective statements, and for the purpose of obtaining initial QMP data. Otherwise, subsequent improvements might not be able to be measured. A block diagram of the process flows would be helpful as an index to the several diagrams included in the storybook.

Summary:

This is a very good CQI Team. The key to significant progress is obtaining and charting the process QPM data. By the next review it would be reasonable to expect documented data and completed test of theories. The review outline document will be forward to other teams as a suggested tool for conducting team reviews.